

NY State of Health  
Assistors  
Registering Your Account

## Assistors: Navigators, Certified Application Counselors (CACs), and Marketplace Facilitated Enrollers (MFEs)

### Registering your Assistor account on NY State of Health

This is a step-by-step guide to help Assistors set up their account. Assistors must successfully complete certification training and then create their account with NY State of Health in order to gain access to their Assistor Dashboard.

Before you can set up your Assistor account, you **MUST**:

1. Have a NY.GOV username and password
  - *If you do not have a NY.gov account, go to the [Assistor Toolkit](#) page and open the section heading that says **Resources for Assistors**. Then, follow the instructions on the document labeled **NYSOH Assistors – Creating Your NY.gov**.*
2. Have received an email with your *unique invitation code*
  - *Once you have completed training, please allow approximately 1 week to receive the email.*
    - *The email will be from [no-reply@info.nystateofhealth.ny.gov](mailto:no-reply@info.nystateofhealth.ny.gov).*
    - *If you do not receive this email in the expected time frame, and you have verified that it is not in your spam or junk folder, you may either email or call the Department of Health for assistance.*
      - *You may email [assistor.admin@health.ny.gov](mailto:assistor.admin@health.ny.gov) or call 518-473-0566.*
3. Know your agency's ID. This Agency ID will be received in an email from NYS Department of Health.
  - *Once you have completed training, please allow approximately 1 week to receive the email.*
    - *The email will be from [Assistor.Admin@health.ny.gov](mailto:Assistor.Admin@health.ny.gov).*
    - *If you do not receive this email in the expected time frame, and you have verified that it is not in your spam or junk folder, you may either email or call the Department of Health for assistance.*
      - *You may email [assistor.admin@health.ny.gov](mailto:assistor.admin@health.ny.gov) or call 518-473-0566.*

# Steps for Creating your NY State of Health Assistor Account:

- Click on the link below, or enter it into your web browser:  
<https://nystateofhealth.ny.gov/agent/assisors>
- Click on Returning Users **CLICK HERE TO LOGIN** with your NYS.GOV ID.

**Assistors**

Certified Application Counselors, Marketplace Facilitated Enrollers, and Navigators are types of assistors that can help New Yorkers apply for health insurance, understand their coverage options, and enroll in a plan that is right for them. They can also help individuals and families renew their coverage. Assistors remove barriers to the application process by providing assistance in multiple languages, in community-based settings, and during non-traditional hours such as evenings and weekends.

**Get Started**

Returning Users  
**CLICK HERE TO LOGIN** ▶  
With your NYS GOV ID.

New Users  
**CLICK HERE TO REGISTER** ▶  
Create a NYS GOV ID.

- Enter your NY.gov **Username** and **Password**.
- Click **Sign In**.

**NY.GOV ID**  
Secure Access to New York State Services

Username  
Assistor1

Password  
.....|

**Sign In**

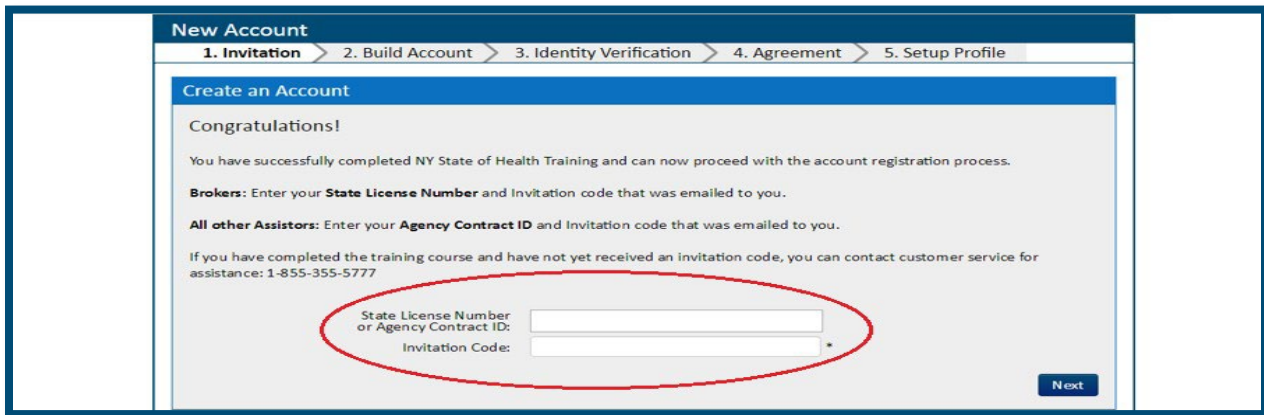
[Forgot Username?](#) or [Forgot Password?](#)

[Create an Account](#)

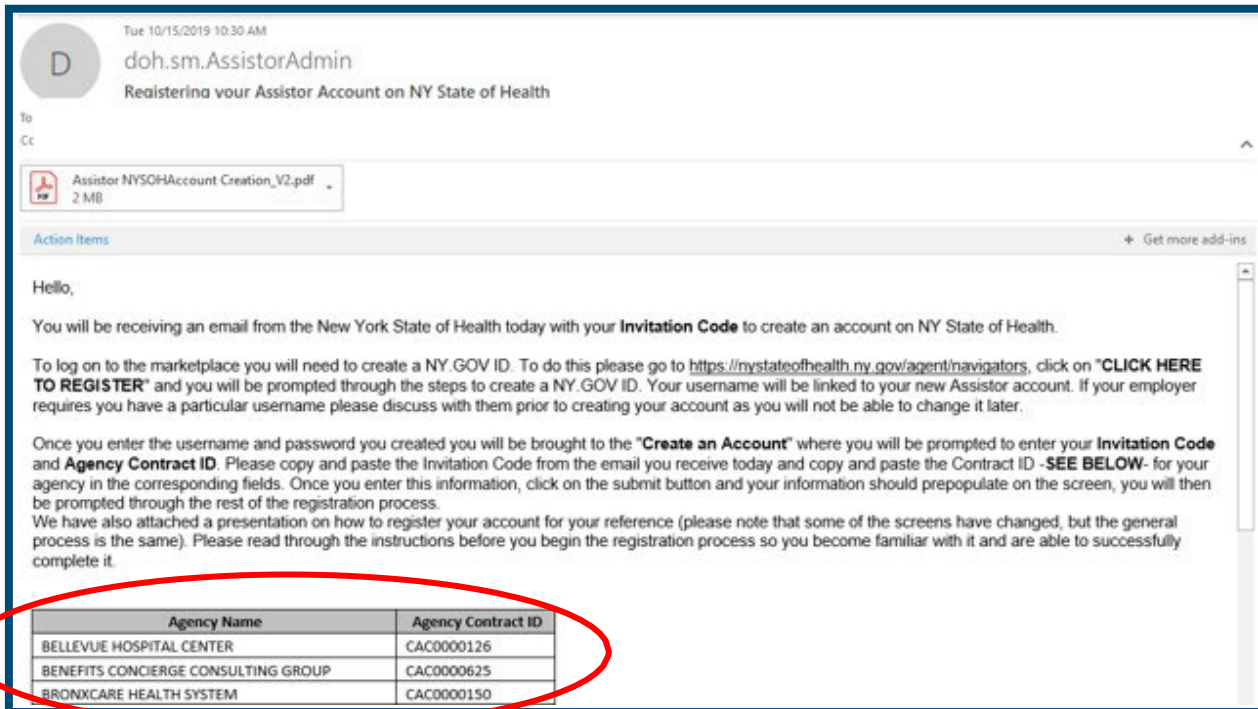
Need help? [Get Assistance](#)

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

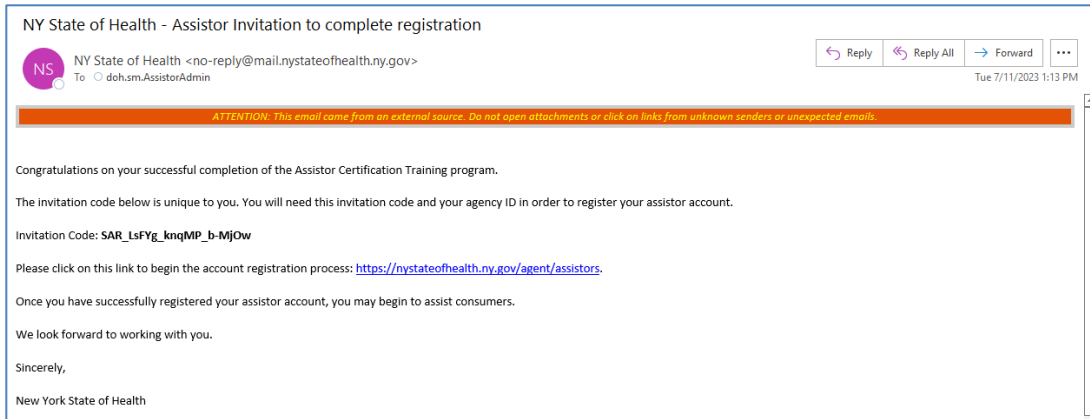
- You will be navigated to the **Invitation** tab on the **Create an Account** screen and asked to input your **Agency ID** and **Invitation Code**.



- Input your **Agency's ID** into the screen above. Copy and paste the Agency Contract ID from your email to avoid input errors.
  - The email will be from [Assistor.Admin@health.ny.gov](mailto:Assistor.Admin@health.ny.gov).



- Input the **Invitation Code**. Copy and paste the invitation code from the email to avoid input errors.
  - *The email will be from [no-reply@info.nystateofhealth.ny.gov](mailto:no-reply@info.nystateofhealth.ny.gov).*



- Click **Next**.

**Create an Account**

**Congratulations!**

You have successfully completed NY State of Health Training and can now proceed with the account registration process.

**Brokers:** Enter your **State License Number** and Invitation code that was emailed to you.

**All other Assistors:** Enter your **Agency Contract ID** and Invitation code that was emailed to you.

If you have completed the training course and have not yet received an invitation code, you can contact customer service for assistance: 1-855-355-5777

State License Number or Agency Contract ID:

Invitation Code:  \*

**Next**



- You will see a Pop-up message which asks you to check the mailing address that you entered.
- The online address validation process takes the address as entered and standardizes it to meet the standard mailing guidelines for the US Postal Service.
  - For example, the extra 4 digits of the zip code may be added.
- Check the **Suggested Address** carefully to make sure it is correct. If it is correct, click on the **Suggested Address**, and then click **Use this as Mailing Address**.
  - If it is not correct, you may click **Cancel** to go back and update the address.
- This process will then be repeated for the **Primary Business Address**, and the **Residential Address**.

**Check Your Address**

NY State of Health checks the addresses in your application with the United States Postal Service. You will be asked to confirm the addresses when you set up your account and will need to reconfirm any addresses that are later changed.

Mailing Address >

Primary Business Address

Residential Address

**Mailing Address**

We found a more complete version of the Mailing Address. Pick the address you want to use. Click on "Use this as Mailing Address" to confirm the address. Click "Cancel" to edit the address you entered.

**Original Address**

- 1 Commerce Plaza  
12th Floor  
Albany, NY 12210

**Suggested Address**

- 1 Commerce Plz Fl 12  
Albany, NY 12210-2822

Use this as Mailing Address

Cancel

- You will be navigated to the **Identity Verification** tab.
- Select your **Gender**.
- Enter your **Date of Birth** and **Social Security Number**. Enter your information exactly and as it appears on your Social Security Card.
- Click **Next**.

**New Account**

1. Invitation > 2. Build Account > **3. Identity Verification** > 4. Agreement > 5. Setup Profile

**Create an Account**

**Identifying Information**

Identity proofing is used by the Marketplace to ensure only authorized individuals have access to personal or proprietary information.  
Please enter your personal information below.

**Gender \***

Male  Female

**Date of Birth \***

01 01 1990

**Social Security Number \***

... .. 7777

**Next**

- Additional identity proofing may be required in the form of a series of 3-5 personal identifying questions. Answer the questions and click **Next**.

**New Account**

1. Invitation > 2. Build Account > **3. Identity Verification** > 4. Agreement > 5. Setup Profile

**Create an Account**

**Personal Identifying Information**

Please answer the following questions to allow verification of your identity.

According to your credit profile, you may have opened an auto loan in or around April 1998. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY.'

TOYOTA MOTOR CRED  
 MITSUBISHI MOTORS CRED OF AMERICA  
 FIRST UNION  
 BANK ONE  
 NONE OF THE ABOVE/DOES NOT APPLY

Please select the number of bedrooms in your home from the following choices. If the number of bedrooms in your home is not one of the choices please select 'NONE OF THE ABOVE'.

2  
 3  
 4  
 5  
 NONE OF THE ABOVE

Using your date of birth, please select your astrological sun sign of the zodiac from the following choices.

AQUARIUS  
 PISCES  
 SCORPIO  
 TAURUS  
 NONE OF THE ABOVE

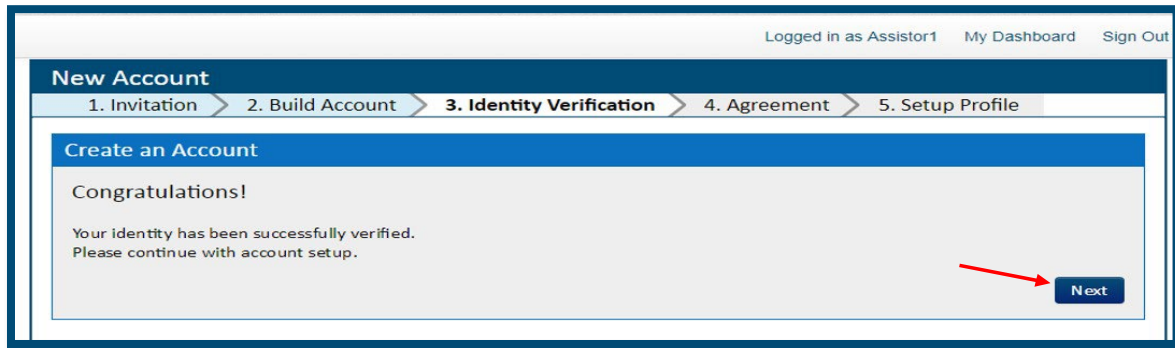
Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'.

TRANSWESTERN PUBLISHING  
 USPS  
 NORTHROP GRUMMAN  
 ARBYS ROAST BEEF  
 NONE OF THE ABOVE

**Next**

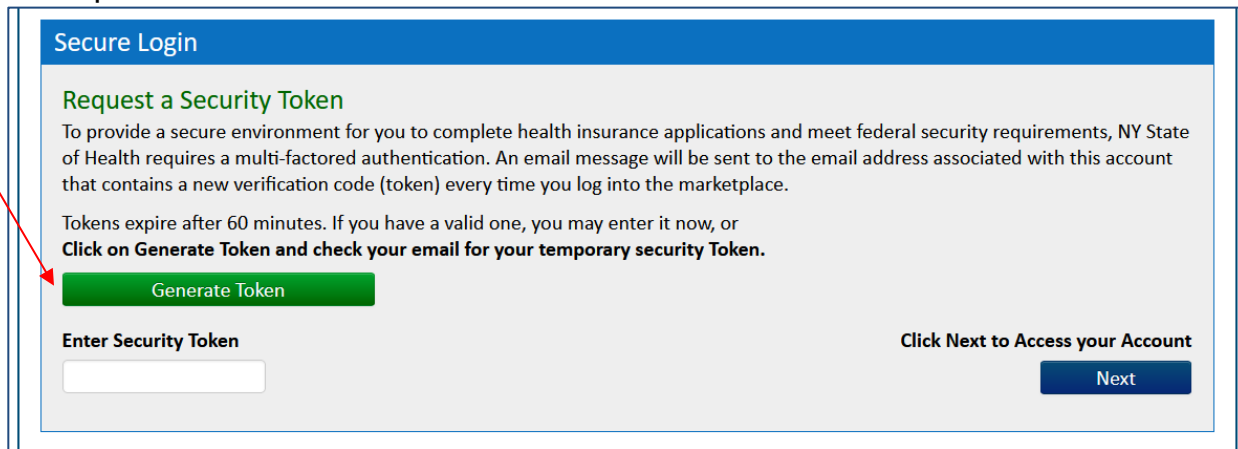


- Upon successful completion of identity proofing, a “Congratulations!” message screen will display, click **Next**.

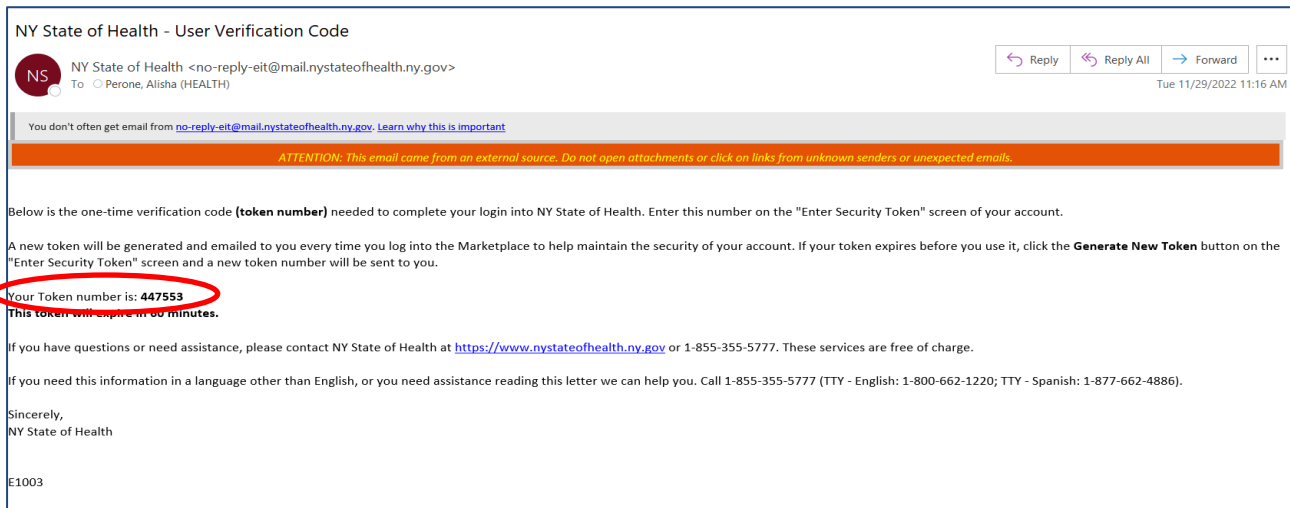


**If Identity Proofing is not successful, send an email to [Eligibility.Training.Support@health.ny.gov](mailto:Eligibility.Training.Support@health.ny.gov).**

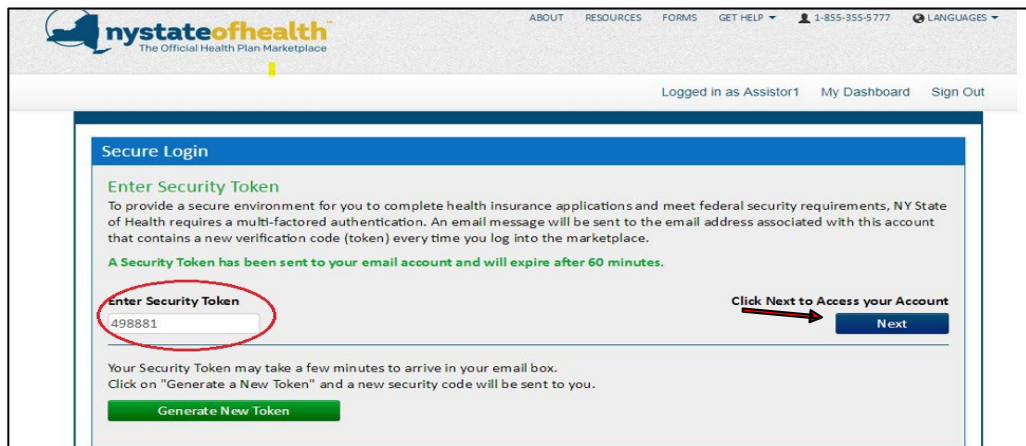
- You will be navigated to the **Secure Login** screen.
- Click **Generate Token**. You will need to generate a new token **each** time you log on to the portal.



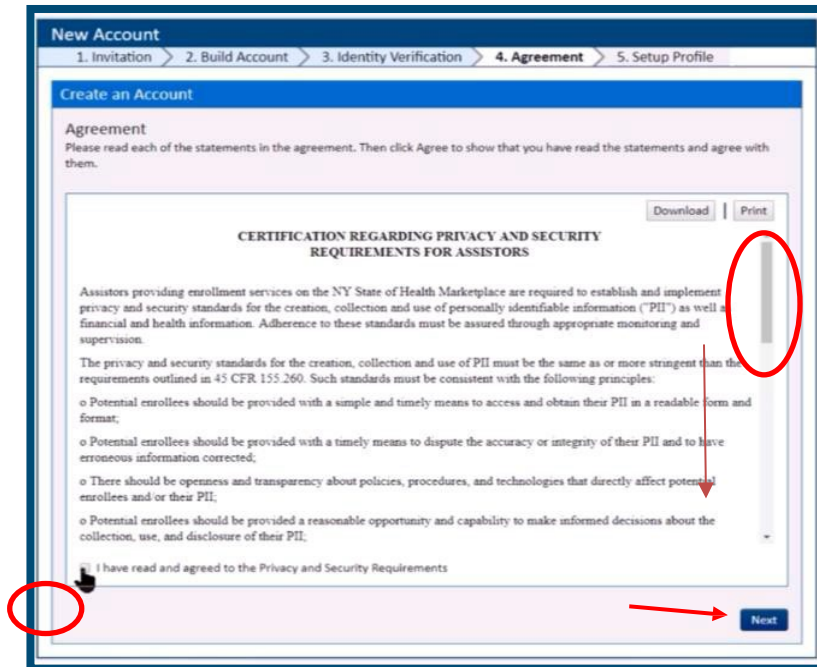
- You will need to check your email account to retrieve the email message sent containing the token.



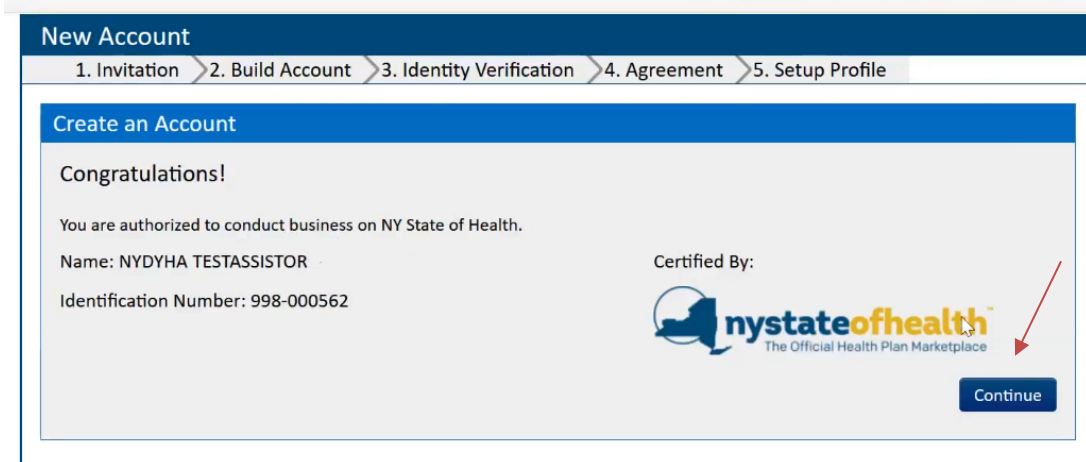
- Once the token has been obtained, enter it into the **Enter Security Token** field and click **Next**.



- You will be navigated to the **Agreement** tab.
- Read each of the statements in the agreement.
- Be sure to scroll all the way down to the bottom within the agreement, in order to activate the “Next” button.
- Check the checkbox next to the statement **I have read and agreed to the Privacy and Security Requirements.**
- Click **Next**.



- You will receive a **Congratulations!** message that you are authorized to conduct business on NY State of Health. You will be given your **Identification Number**, which is the same as your *Certification Number*.
- Click **Continue**.



- You will be navigated to the **Setup Profile** tab.
- Select your **Account Preferences**.
  - If you check **Hide Profile from All Searches**, that means that you will not appear as an Assistor on the public search. A consumer logged in with their NY.gov username will not be able to select you as their Assistor and the Call Center will not be able to find you as an Assistor to add you to a consumer’s account.
  - If you check **Hide Profile from Public Search**, that also means that you will not appear as an Assistor on the public search. However, A consumer logged in with their NY.gov username will be able to select you as their Assistor. Also, the Call Center will be able to find you as an Assistor to add you to a consumer’s account.
  - If you check **Send me Client Renewal Reminder Notice**, you will receive notices to the My Inbox tab of your Assistor Dashboard. These notices will provide you with a list of accounts on your dashboard which are due to renew in the upcoming and subsequent months.
- Select the counties you serve (**Counties Served**) from the **Counties List**.
  - This should reflect the counties in which you are able to provide application assistance.
- Select the languages you support (**Languages Supported**) from the **Languages List**.
- Click **Submit**.

**New Account**

1. Invitation
2. Build Account
3. Identity Verification
4. Agreement
5. Setup Profile

**Create Profile**

Identification Number: 998-000441

**Account Preferences**

Hide Profile from All Searches

Hide Profile from Public Search

Send me Client Renewal Reminder Notice

You can select more than one county or language by holding down the control button when making your selection.

<b>Counties List</b>	<b>Counties Served</b>	<b>Languages List</b>	<b>Languages Supported</b>
ALBANY ALLEGANY BRONX BROOME		Chinese English French French Creole	

**Agency Affiliation:**

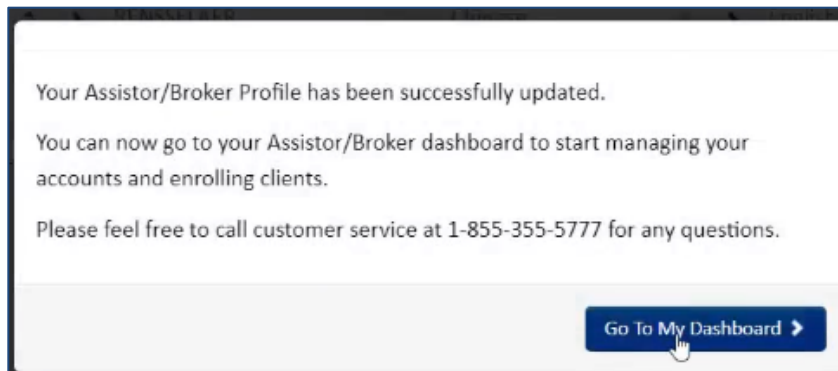
Agency Affiliation

My Agency Affiliations: NYS DOH Agency Contract ID: CAC0000998

Please confirm that the information above, related to your NY State of Health certification and service details is accurate. This information will be displayed when potential clients are searching for a Broker, Navigator or Certified Application Counselor.

Submit

- You have now successfully set up your Assistor Profile.
- Click **Go To My Dashboard**.



- Your **Dashboard** screen will now be displayed.
- At the upper left-hand corner of your dashboard screen, you will see your **Account Number** and underneath that, your **Certification Number**.
- To edit your account information, click on the **My Profile** tab.
- To see a list of your current clients, click on the **My Clients** tab, then click on the **Individual** tab and select your **Associated Agency** from the drop-down list.
- To **add** an individual, follow the steps above to see the list of current clients, and then click **Add Individual**.

